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## User Guide for Manual Reporting of the Quarterly Performance Report (FORM 10)

### Overview

The Quarterly Performance Report (referred to hereafter as QPR) is to be used by state agencies as a tool for planning and documenting performance. It is required that each state agency input a minimum of one goal and one performance objective into their QPR. As directed in Section 41-19-11 of the Budget Management Act (Code of Alabama 1975), each state agency/department is required to submit a performance report. These requirements will be accomplished through a new report titled “Quarterly Performance Report (FORM 10)”. This guide will walk users through the manual process of downloading a hardcopy of the reporting template and the steps necessary to input annual and quarterly data into the template.

### General Instructions

1. Accessing the Form: From the home page of the Executive Budget Office web site ([www.budget.alabama.gov](http://www.budget.alabama.gov)), click on Documents and Forms in the task bar. Select “Quarterly Performance Reporting Template and Instructions” (Manual Reporting). When the page opens, select either the QPR Excel Template or the Instructions.
2. Navigating: Once you open the Excel template, you will find that the page is protected and allows for data entry only in specific cells. If there is a need to unprotect the sheet for any reason, a user can do so by selecting REVIEW in the Excel menu bar (Office 2010 users) and select Unprotect Sheet. There is no password associated with the template.
3. Inputting Initial Data (Mission-Vision-Goals-Objectives-Targets):. **Initial data submission into QPR reports for each new fiscal year is allowed during the first quarter, between October 20<sup>th</sup> and November 20<sup>th</sup> each year.**

To input data into a text field, simply click your mouse inside of the text box and begin typing. Typically, data should be entered into the excel template in the following order:

- i. Enter Agency Mission (“Mission” should represent the purpose of the Agency)
- ii. Enter Agency Vision ( Agency “Vision” should reflect the long term goal of where the agency would like to be if all annual goals and objectives are met)
- iii. Enter Annual Goals.

- iv. Enter Objectives. You will need to include a unit of measure for each Objective, as well as the Goal # that correspond with the Objective.
  - v. Quarterly and Annual Target data should now be added to the template. Annual Targets do not necessarily have to be the sum of each of the 4 quarter targets data.
  - vi. After inputting an Objective and Its corresponding target data, users can enter any notes in the Notes field at the bottom of the template.
  - vii. When all Mission-Vision-Goals-Objectives-Target data have been entered, Save the Document to your computer, and email a PDF copy to your budget analyst at the Executive Budget Office.
4. Inputting Actual Quarterly Results for Each Objective: Actual data should be entered by the 15<sup>th</sup> day of the month following the end of each fiscal year quarter. For example, actual data for the 4<sup>th</sup> quarter of 2012 would be reported by October 15.
- i. Open the QPR Report that you previously saved on your computer. For each Objective, enter the correct data in the appropriate quarter's "Actual" column and save the document back to your computer.
  - ii. Target Data should not change during the FY, the only data required each quarter is the actual data from the previous quarter.
  - iii. Once you have completed submitting all actual data for a quarter, email a PDF copy of the QPR to your Budget Analyst at the Executive Budget Office.

5. Reviewing your work: Before submitting a completed QPR to the Budget Office, please print a copy of the report and review the data for completeness and accuracy. Below is an example of a completed Quarterly Performance Report:

Fiscal Year 2012 Quarterly Performance Report												
Agency:	001 - AGRICULTURE & INDUSTRIES											
Mission:	To provide an abundant and safe agriculture for the state of Alabama.											
Vision:	To lead the way in growth, safety, and productivity.											
Annual Goals												
	1	To provide: Supervisory, personnel, legal, information technology, financial, public relations, and general services to all departmental programs and personnel.										
	2	Maintain the total number of internal and external audits performed by Auditing staff through FY 13.										
	3	To assure safe food, ethical pest control practices, quality petroleum products and accurate weighing.										
Quarterly Objectives and Targets												
			First Quarter		Second Quarter		Third Quarter		Fourth Quarter		Annual	
Performance Objectives	Goal	Unit of Measure	Target	Actual	Target	Actual	Target	Actual*	Target	Actual*	Target	Actual*
1 The number of Executive Administration activity regulatory action units.	1	Spending / # of regulatory action units	75	50	60	76	55				257	300
2 Petroleum commodities inspection fee reports to be received.	1	Number of regulatory action units.	50	45	52	54	35				200	194
3 Increase # of audits per auditor due to attrition.	2	Number of audits/auditor	15	14	15	16	15		15		60	
4 Maintain accurate and thorough testing with less staff.	3	Count of correct tests	30	32	45	44	50		60		225	
* Actual performance data is not available for this quarter.												
Notes	Objective Number											
	1	This is a made up item.										
	1	Consider this item to be true.										
	2	Currency will be in U.S. dollars (\$).										
	3	Due it write the first tyme!										